

**ORIENTATION FOR NEW EMPLOYEES  
MANAGER CHECKLIST**

**INSTRUCTIONS**

Every new member of staff, needs to be introduced to the work environment and instructed in the performance of specific tasks. The orientation is intended to get the new employee off to a good start by establishing a sense of belonging by creating a welcoming work environment, by supplying necessary information that will answer the new employee's questions, and by removing uncertainties.

This checklist is to be completed for all new members of staff, and some parts should also be undertaken in case of temporary assignments or promotions.

Responsibility for planning on-the-job training for new employees, for conducting the orientation meetings and for the completion of this form rests with the new employee's immediate supervisor.

To better help you track where you are in the orientation process, items on the checklist should be marked off as they are reviewed and discussed. Most items should be addressed within the first few days of employment. Although information listed on this form may be provided by other staff or University departments, the supervisor should review everything on the checklist to ensure that all items have been sufficiently covered. The form should be signed and dated by the new employee's immediate supervisor and retained in the staff member's departmental personnel file for future reference.

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Employee Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date of hire: \_\_\_\_\_

**BEFORE THE START DATE**

*You can submit requests for workspace, telephone, computer and accounts for a new employee **as soon as you have the employee number**. You may encounter delays so we suggest you submit your requests as soon as possible.*

	Date or N/A	Initials
Determine computer needs		
Investigate space requirements and make arrangements for work space for the new employee		
Once a workspace is identified, contact Computing & Communications (Telephone) and/or your departmental technician (Computer). Ensure that computer and telephone are installed and working		
Arrange for software installation and set up all needed accounts (Windows account with email, SIS account if needed, etc.)		
Register new employee for "Brief Orientation", "Competency-based: Performance Appraisal", WHIMIS requirements and "Service Excellence" at <a href="mailto:formatio@uottawa.ca">formatio@uottawa.ca</a>		
Obtain name tag and business cards (as per Faculty /Department/ Service's internal policy)		
Update phone lists, University directory, schedules, org chart, departmental e-mail lists, etc.		
Introduce new employee by e-mail (name, title, start date), cc the new employee.		
Ensure the (immediate) team is aware of the new employee start date and has some time in the first week to meet to explain their work		
Personal call from Manager prior to the new employee first day to welcome them to the University and inform them on where , exactly they should present themselves and that you will be taking them out for lunch on their first day (if appropriate)		
Coordinate a meaningful first work assignment		

Comments/Notes: \_\_\_\_\_

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## ORIENTATION FOR NEW EMPLOYEES MANAGER CHECKLIST

### EMPLOYEE'S FIRST DAY ON THE JOB

*The Manager (Supervisor) should plan a smooth first day experience for the new employee to ease any apprehension s/he may have about beginning a new job. Because you are the immediate supervisor of the new employee, the University relies on you to provide a welcome, encouraging, and supportive beginning to the employee work life with the University of Ottawa.*

	Date or N/A	Initials
Keep your schedule free to meet with the new employee. If you are not going to be available, ensure someone is available for the new employee at all time during his/her first day on the job		
Greet employee and review/discuss the plans for the day		
Tour the immediate area and assigned work space and introduce the new employee to each of the team members and other staff members		
Provide overview of the department: structure & responsibilities		
Give the employee a copy of the job description and competency profile. Explain importance of the position and how it relates to other positions in the team. Explain how performance is managed and length of probation (if applicable)		
Ensure employee has received and returned all signed documents to HR (e.g. Contract (regular, contract, temporary), Benefits, Payroll)		
Provide the employee with their passwords, business cards, keys, access cards or codes, etc.		
Give list of employees' names and e-mail addresses in the service/department/Faculty		
Talk about specific work week, scheduled hours, policies and procedure regarding overtime		
Talk about lunch period and breaks		
Explain pay schedule, date first pay should be deposited in the employee's bank account		
Show new employee emergency exits, restrooms, closest cafés/cafeteria, etc		
Inform the employee where are the office supplies and procedures for ordering new supplies		
Take the new employee to lunch on their first day of work or arrange to have someone to have lunch with the new employee (if appropriate)		
Review computer set up, log on, e-mail, telephone system and data security		
Inform employee of who to call for security, computer assistance and phone system		
Meet with the new employee to explain work and expectations, answer questions and schedule regular meetings for the next few months		
Review the first-week schedule of activities		
Inform the employee of mandatory and compulsory training sessions/workshops and other training applicable to the employee's job. Confirm training schedule.		
Allow unscheduled time for employee to organize work area, set up voice mail message, etc		
Anything else you feel would make the first day a positive, memorable experience.		

Comments/Notes: \_\_\_\_\_

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**ORIENTATION FOR NEW EMPLOYEES  
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**DURING THE EMPLOYEE'S FIRST TWO WEEKS**

	Date or N/A	Initials
Review time off/vacation/University paid vacation/sickness/ other personal leave policies		
Explain policies/expectations regarding, lateness, overtime, flextime (if applicable)		
Explain "call in" procedure and procedure for reporting absences (sickness, emergency, etc.). Explain scheduling of vacation time within department		
Discuss and explain the department's goals, mission and departmental business issues		
Discuss job duties, job expectations and performance (performance standards, competencies and/or objectives).		
Reinforce the Service Excellence- Service Standards - Web Site- <a href="http://www.uottawa.ca/academic/info/index/excellence/index_en.html">http://www.uottawa.ca/academic/info/index/excellence/index_en.html</a>		
Review /discuss assignments (e.g. first project) awaiting the new employee (if applicable) and schedule specific feedback session		
Ensure employee has met with each team member and understands their job		
Give the employee a list of all staff meetings		
Inform the employee of department, association and other e-mail lists and how to have their name added to the lists		

Comments/Notes: \_\_\_\_\_

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## ORIENTATION FOR NEW EMPLOYEES MANAGER CHECKLIST

### DURING THE EMPLOYEE'S FIRST THREE TO FOUR WEEKS

*As a Manager (Supervisor) your ongoing support is crucial for a successful integration of the new employee to the job, the team and the work environment. We suggest you meet regularly with the new employee to answer questions and insure that the new employee is becoming acclimated to the department and position responsibilities.*

	Date or N/A	Initials
Ask employee if s/he understands who to call for assistance		
Validate that employee knows department goals and mission, the specific function of the units and key contacts for the position		
Validate that employee knows job expectations, job duties, specific tasks and responsibilities		
Talk about the University policies relating to the positions, departments, projects, programs		
Ensure employee knows about access to sport facilities, library, etc.		
Educate employee on the University's policies on employment equity, sexual harassment, confidential information, etc. Invite employee to read the University's policies and other safety and security policies - Web site- <a href="http://www.uottawa.ca/sec-univ/eng/pol.html">http://www.uottawa.ca/sec-univ/eng/pol.html</a> . - Web site- <a href="http://www.uottawa.ca/services/annuaire_urgence.pdf">http://www.uottawa.ca/services/annuaire_urgence.pdf</a>		
Inform employee of the emergency evacuation procedure		
Explain to the employee the access to the Employee Assistance Program and injury or work-related illness process – Web Site- <a href="http://www.uottawa.ca/services/hr/newweb/health_e.html">http://www.uottawa.ca/services/hr/newweb/health_e.html</a>		

Comments/Notes: \_\_\_\_\_  
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Supervisor's Signature: \_\_\_\_\_ Date: \_\_\_\_\_